

**SUMMARY OF THE
ON-SITE ASSESSMENT COMMITTEE MEETING
AUGUST 11, 1999**

The On-site Assessment Committee of the National Environmental Laboratory Accreditation Conference (NELAC) met by teleconference on Wednesday, August 11, 1999, at 11 a.m. Eastern Daylight Time (EDT). The meeting was led by its chair, Mr. Steven Baker of the Arizona Department of Health. A list of action items is given in Attachment A. A list of participants is given in Attachment B. *The primary purpose of the meeting was to discuss assessor training issues.*

TRAINING ISSUES

“Grandfathering”

Mr. Baker alerted the committee to a letter he had received from Mr. Anthony Bright of the Oklahoma Department of Environmental Quality. Mr. Bright’s letter expressed support for the “grandfathering” of experienced assessors without mandated assessor training. Moderate discussion of the issue proved the committee to be united in their belief that consistent training for all assessors is a necessity. It was noted that even experienced assessors will now be performing audits under a new program. Mr. R. Wayne Davis will draft a response to Mr. Bright on behalf of the On-site Assessment Committee.

Approval

Mr. Baker noted that, in consultation with Ms. Jeanne Mourrain, NELAC Director, and Ms. Elizabeth Dutrow, NELAC Executive Secretary, he had been made aware that the On-site Assessment Committee has no legal authority to approve training courses. Although the Registrar Accreditation Board (RAB) has often been mentioned as a potential approval body, the process of obtaining RAB approval has been deemed too expensive. It was suggested that NELAC establish a separate review board, similar to the Accrediting Authority Review Board (AARB), to approve assessor training courses. Ms. Barbara Finazzo, the committee’s NELAC Board of Directors (BoD) liaison, noted that there exists much confusion within NELAC about the approval process for assessor training. She suggested that the On-site Assessment Committee be proactive in presenting some kind of statement or policy about course approval. Participants discussed forming a subcommittee to investigate the possibility of establishing a review board to approve training. They also suggested using the American Society for Quality (ASQ) training document as a guide for creating the approval process. Mr. David Friedman noted that he had been contacted by Mr. Robert Gintano, of ChemData Professionals, who expressed an interest in such training issues. After considerable discussion, it was suggested that Ms. Marlene Moore and Mr. Gintano work together to draft an approval process using the ASQ training document as a guide, and that they present the draft policy to the committee at a teleconference in the near future. Mr. Friedman indicated that he would contact Mr. Gintano and instruct him to contact Ms. Moore.

There ensued some discussion of the time constraints surrounding the issue of training approval. Committee members noted that there is a push to offer basic training by the end of calendar year 1999. Ms. Finazzo commented that the legwork for establishing a draft approval process needs to be done as soon as possible in order to present the concept at the Fifth NELAC Interim Meeting. She will contact Ms. Mourrain and Ms. Dutrow to see if they have any input on the issue.

Satellite Facilities

After consultation with Ms. Mourrain and Ms. Dutrow, Ms. Finazzo informed the committee that it is not viable to use U.S. Environmental Protection Agency (USEPA) satellite facilities to offer assessor training. Mr. Friedman noted that the U.S. Department of Agriculture (USDA) runs a national video teleconferencing service. It was also noted that the National Chamber of Commerce offers such services. The committee suggested that they broaden their focus in looking for satellite facilities to offer training. Mr. Friedman will provide information on the USDA service to Ms. Finazzo so that she can coordinate a teleconference with Ms. Mourrain and Ms. Dutrow.

Course Development

Dr. Margot Hunt, USEPA, joined the committee as an invited guest to discuss development of the basic training course. She noted that the contractor developing the basic training course is an experienced adult learner. The contractor has sent Dr. Hunt an outline for days 1 through 3. After deciding that course participants need an overview of the NELAC system before addressing basic assessment techniques, the contractor prepared the outline in such an order. Committee members responded by pointing out that the training summary does not track with either the Standard as approved or the training manual that has already been posted on the NELAC Website as a reference. They questioned whether the training summary prepared by the contractor will replace the existing manual, and noted that approval of a Standard that tracks with the proposed training summary cannot be accomplished until the Sixth NELAC Annual Meeting. It was decided that committee members will study the issue and be prepared to discuss it at their next teleconference so that Dr. Hunt can take committee feedback to the contractor to make adjustments. It was also decided that the contractor should talk to an assessor familiar with ISO-type systems auditing and to someone from the laboratory community in order to understand assessor training issues from both perspectives. Mr. William Ingersoll, Mr. Charles Dyer, and Mr. Jack Hall indicated their willingness to talk with the contractor.

Dr. Hunt made several comments based on her review of the materials received from the contractor. She noted that if the written exam at the end of the course consists of 100 questions, then examiners will need a test bank of at least 500 questions from which to prepare their exam. If the On-site Assessment Committee cannot come up with the basis for 500 questions, then the contractor will need to do so. This raises the question of who will maintain the test bank. Will it be the committee or someone else? Dr. Hunt noted that the contractor will actually write the questions, but will need committee input on what to emphasize and on format. She solicited input on committee preference for question format (multiple choice, true-false, fill-in-the-blank, essay, etc.) and exam format (number of questions, open-book versus closed-book, etc.) She suggested that the committee must first decide the purpose of the written exam. Is its purpose to test

knowledge of the Standard, to test knowledge of how to audit, or to test knowledge of environmental programs? In the ensuing discussion, the committee reached agreement on their preference for an open-book test comprised of multiple choice and true-false questions. They commented that knowledge is knowing where to find the answer and noted that offering an open-book exam would make it possible to include more challenging questions.

MISCELLANEOUS BUSINESS

Assessor Checklists

In brief discussion of assessor checklists, Ms. Finazzo noted that there is some confusion among NELAC stakeholders about the technical checklists currently posted on the NELAC Website. Some people think that the checklists are what they need to use to get ready for the National Environmental Laboratory Accreditation Program (NELAP). They do not understand that the checklists are works in progress. There was considerable discussion of the level of detail to be included in the checklists. Mr. Davis indicated that he would complete his microbiology checklist by September 1, 1999.

Contact Information

Ms. Athene Steinke informed the committee of a change in her e-mail address. Her new address is *asteinke@stl-inc.com*.

CONCLUSION

The committee tentatively scheduled their next two teleconferences for September 1 and September 22, 1999. Mr. Baker will contact Ms. Carolyn Cross-Talbert to schedule these teleconferences. The allotted teleconference time having expired, the committee meeting was adjourned at 1 p.m. EDT.

**ACTION ITEMS
ON-SITE ASSESSMENT COMMITTEE MEETING
AUGUST 11, 1999**

Item No.	Action	Date to be Completed
1.	Mr. Davis will draft a response to Mr. Anthony Bright, Oklahoma Department of Environmental Quality, regarding “grandfathering” of assessors.	ASAP
2.	Mr. Friedman will contact Mr. Robert Gintano, ChemData Professionals, to refer him to Ms. Moore for collaboration on draft approval policy.	ASAP
3.	Ms. Moore and Mr. Gintano will present draft proposal to On-site Assessment Committee via teleconference.	
4.	Ms. Finazzo will contact Ms. Jeanne Mourrain and Ms. Elizabeth Dutrow to get their input regarding issue of approval of training.	
5.	Mr. Friedman will provide Ms. Finazzo with information regarding national video teleconferencing service offered by USDA.	
6.	Committee will consider training course summary distributed by Dr. Margot Hunt for discussion at next teleconference	9/1/99
7.	Mr. Davis will complete microbiology assessor checklist and distribute to committee members.	9/1/99
8.	Mr. Baker will schedule teleconferences for 9/1/99 and 9/22/99.	ASAP

PARTICIPANTS
ON-SITE ASSESSMENT COMMITTEE MEETING
AUGUST 11, 1999

Name	Affiliation	Phone/Fax/E-mail
Baker, Steven Chair	AZ Dept of Health Svcs, Lab Lic. & Cert.	T: 602-255-3454 F: 602-255-3462 E: sbaker@hs.state.az.us
Buhl, Rosanna	Battelle Ocean Sciences	T: 781-952-5309 F: 781-934-2124 E: buhl@battelle.org
Davis, R. Wayne	SC Dept. of Health and Env Cntl	T: 803-935-7025 F: 803-935-6859 E: davisrw@columb36.dhec.state.sc.us
Davis, Susan	City of Austin	T: 512-927-4004 F: 512-927-4038 E:
Dyer, Charles	NH Dept of Environmental Services	T: 603-271-2991 F: 603-271-2867 E: c_dyer@des.state.nh.us
Friedman, David	USEPA/EMMC	T: 202-564-6662 F: 202-565-2432 E: friedman.david@epa.gov
Hall, Jack	Quanterra, Inc.	T: 423-588-6401 F: 423-584-4315 E: hallj@quanterra.com
Ingersoll, William	US Navy	T: 843-764-7337 F: 843-764-2373 E:
Moore, Marlene	Advanced Systems, Inc.	T: 302-834-9796 F: 302-995-1086 E: mmoore@advancedsys.com
Steinke, Athene	Severn Trent Laboratories (STL Baltimore)	T: 410-771-4920 F: 410-771-4407 E: asteinke@stl-inc.com
Finazzo, Barbara Ombudsman	U.S. EPA Region 2	T: 732-321-6754 F: 732-321-4381 E: finazzo.barbara@epamail.epa.gov
Hunt, Margot (Invited Guest)	USEPA/ORD/QAD	T: 202-564-6457 F: 202-565-2441 E: hunt.margot@epamail.epa.gov
Siegelman, Frederic (Invited Guest)	USEPA/ORD/QAD	T: 202-564-5173 F: 202-565-2441 E: siegelman.frederic@epamail.epa.gov
Greene, Lisa (Contractor Support)	Research Triangle Institute	T: 919-541-7483 F: 919-541-7386 E: lcg@rti.org